

PERSONAL TAX ORGANIZER
TAX YEAR 2016

Personal Information

Name: _____ SIN: _____

Address: _____ Date of Birth: _____

_____ Phone: _____

Email: _____

Spouse: _____ SIN: _____

Marital Status: ___ Married ___ Single ___ Common-law ___ Separated ___ Divorced ___ Widowed

If married or common-law, should your return be filed jointly with your spouse's return? ___ Yes ___ No

If married or common-law and we are not preparing spouse's return,
please indicate spouse's net income: \$ _____

If your marital status changed during the year, provide date of change: _____

Residence

Province or territory of residence on December 31: _____

Did you immigrate to Canada or emigrate from Canada during the year? Yes No

If yes, provide the date of entry into Canada: _____ or the date of departure: _____

Did you dispose of a Property (or Properties) in 2016 for which you are claiming a Principal Residence Exemption?
Yes No

Elections Canada

Are you a Canadian citizen? ___ Yes ___ No

If yes, do you authorize the CRA to provide your name, address and
date of birth to Elections Canada to update your information on the
National Register of Electors ___ Yes ___ No

Foreign Reporting

Did you own or hold foreign property with a total cost of more than CDN\$100,000
at any time during the year? ___ Yes ___ No

MURDOCK & ASSOCIATES INC.

Dependents

Name	Relationship	Date of Birth	SIN	Disability Amount	Income	Child Care Expenses

Universal Child Care Benefits (UCCB) – Is the RC62 slip attached? Yes No

If you are a single parent, is the UCCB designated to a dependant? Yes No

General Income/Deductions

T4 slips – Employment Income? Yes No

T4A – Commission and self-employment? Yes No

T4E – Employment Insurance? Yes No

T5007 – Social assistance? Yes No

Employment income or taxable benefits not shown on the T4 slip?

Amount and organization of union/professional dues?

List of child care expenses, with receipts? Yes No

List of moving expenses paid in the year? Yes No

List of support payments made or received? Yes No

List of deductible employment expenses? Yes No

Is a signed form T2200 attached? Yes No

Retirement Income

T4A – Pension, retirement and annuity income? Yes No

T4AP – Canada pension plan benefits? Yes No

T4A(OAS) – Old age security pension slip/foreign pensions? Yes No

T4A(RCA) – Retirement compensation arrangements? Yes No

T4RSP – Registered retirement savings plan income? Yes No

T4RIF – Registered Retirement income fund income? Yes No

U.S. Social Security or other foreign pension income? Yes No

Do you elect to split eligible pension income?
with your spouse or common-law partner? Yes No

MURDOCK & ASSOCIATES INC.

Investment Income/Deductions

T3 – Income from trust allocations? Yes No
T5 – Investment income? Yes No
T4PS – Income from profit sharing plans? Yes No
T5013/T5013(A) – Partnership income? Yes No
T5008 – Income from securities transactions? Yes No

Did you dispose of property during the year? If so, provide the following details in a separate list:

Description of Property	Date Acquired	Date Disposed	Proceeds	Cost	Expenses

Interest paid to earn investment income \$ _____
Rental fee on safety deposit box \$ _____
Accounting/legal fees for investments \$ _____

Self-Employment/Business Income

Financial statements(s)/ schedule of revenue and expenses attached? Yes No
Are you GST/HST registered? Yes No
Have you registered to be eligible for employment insurance special benefits? Yes No
If an owner/manager, did you have loan from the Business outstanding during the year? Yes No
If you used a vehicle for business, are the vehicle expenses and both total and business mileage information attached? Yes No
If you used a portion of your home for business, are the home expenses and both total and business square footage information attached? Yes No
Is a list of all new asset additions attached? Yes No

Rental Income

If you owned rental property, is a statement of rental income attached? Yes No

RRSP Contributions

Receipts for RRSP contribution(s) attached? Yes No

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Federal and Provincial Tax Credits

T2202 – Tuition/education amount for you?

T2202 – Tuition/education amount claimed on transfer from the dependant?

Receipt or amount for your student loan interest?

Receipts/listing of all medical expenses paid in the year for you,
Spouse, and dependants?

Receipts for charitable donations?

Receipts for political contributions?

Tickets for public transit?

Receipts/listing for fitness amount paid for each child?
(The child must have been under 16 years & claim up to a maximum of \$500 per child).

Receipts/listing for activities paid for each child?
(The child must have been under 16 years & claim up to a maximum of \$250 per child).

Statement for new home to claim the home buyer's amount?

Amount of property taxes/rent paid in the year? _____

Amount of Home Accessibility Expenses? _____
(Eligible dwelling cannot be more than \$10,000).

Eligible educator school supply tax credit?
(If you were an eligible educator, you can claim up to \$1,000 for eligible teaching supplies Expenses).

Prior Year Tax Returns and CRA Correspondence

Is a copy of the Notice of Assessment for last year's tax return attached? Yes No

If new to the firm, are tax returns (and corresponding Notices of Assessment)
for the last three years attached? Yes No

If you claimed a loss carryback in any of the preceding three years,
are the Notices of Reassessment for those years attached? Yes No

Is a copy of any other correspondence from the Canada
Revenue Agency attached? Yes No

If you are not already set up for direct deposit with the CRA and would like
to do so, is a void cheque attached? Yes No

Is your statement of instalments paid for the year attached? Yes No